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Market Development Reports

Macau - A Booming Market for U.S. Exporters 2008

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Report Highlights:

U.S. exports of consumer-oriented agricultural products to Macau reached a record high of US\$9 million in 2007, up 26% over 2006 and are expected to reach US\$12 million in 2008. This surge is a result of Macau's growing casino tourism and demand for quality-reliable food products by hotel catering/restaurants. Macau hosted 27 million visitors in 2007, a growth of 127% over 2003 and set to reach a record of 32 million tourist arrivals this year. Macau's casino revenues reached US\$10.5 billion, compared to Las Vegas' US\$6.8 billion in 2007. Macau's HRI sector is expected to expand as more new casinos/resorts are set to open by 2010. In addition, Macau is deliberating a new policy to eliminate its tax on wine and beer, which is expected to stimulate direct exports of these products to Macau. Macau's total imports of consumer-oriented F&B products are expected to reach US\$500 million in 2008, 20% growth over 2007. As this market continues to develop, so will the growing opportunities for U.S. high quality foods and beverages. The top prospects for the Macau market include: wine, red meats, dairy products, confectionery products, fruit and vegetables. Wine and Gourmet Asia Show (Nov 5-7, 2008) provides an excellent opportunity for U.S. F&B exporters to penetrate this fast-growing market.

Includes PSD Changes: No
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AGRICULTURAL EXPORTS RO MACAU

Direct Exports

Macau's spectacular economic growth, followed by the opening up of its gaming and tourism industries in 2002 and 2003 respectively, has created a fast-growing market for US F&B exports. For general background information on the Macau market, please refer to GAIN Report HK6027.

In 2007, worldwide direct exports of Consumer Oriented Agricultural Products¹ (COAP) to Macau reached US\$417 million, an increase of 34% over 2006. It is expected that the value will reach US\$500 million in 2008.

Table 1: Direct Exports of COAP to Macau (US\$ Million)

Supplying Countries	2006	2007	% Change	2008 *
Worldwide	312	417	34%	500
Hong Kong	184	258	40%	320
China	73	91	25%	100
Canada	20	23	15%	25
France	7	11	57%	15
United States	7	9	26%	12
From Top 5 Suppliers	291	392	35%	472
From Rest of World	21	25	19%	28

(Source: Global Trade Atlas)
(* Estimated figures for 2008)

Table 1 also shows that Macau's imports of COAP are concentrated on several major suppliers. The top 5 supplying countries supplied 94% of total COAP to Macau. The US is the 5th largest supplier of COAP to Macau. Value of direct exports of US COAP was US\$9 million and is expected to reach US\$12 million in 2008, as shown in Table 2 below:

Table 2: US Exports of COAP to Macau (US\$ Million)

HS Code	Description	2003	2004	2005	2006	2007	Growth 07/06	2008*
	Consumer Oriented Agriculture Total	0.68	0.69	0.83	7.19	9.07	26%	12.0
	Top 5 Categories							
2204	Wine Of Fresh Grapes; Grape Must Nesoi	0.31	0.16	0.14	1.01	5.65	457%	10.5
1601	Sausages, Similar Prdt Meat Etc Food Prep Of These	0.00	0.00	0.00	1.41	3.01	114%	0.5
0203	Meat Of Swine (Pork), Fresh, Chilled Or Frozen	0.00	0.00	0.00	0.05	0.16	222%	0.5
210690	Food Preparations Nesoi	0.04	0.16	0.36	0.11	0.07	-35%	0.1
2004	Vegetables Nesoi Prepared Or Preserv Nesoi, Frozen	0.34	0.27	0.02	0.00	0.07	NA	0.1
	Total of Top 5 Categories	0.68	0.60	0.52	2.59	8.96	247%	11.7
	Total of the Rest	0.01	0.09	0.31	4.60	0.11	-98%	0.3

(Source: World Trade Atlas)
(* Estimated figures for 2008)

Hong Kong is the largest supplier, supplying 62% of total COAP to Macau. As Hong Kong is not a food producing region, most of its exports of COAP to Macau are originated from other Countries². A closer examination of the products Hong Kong re-exported to Macau can shed light on popular COAP items under large demand in Macau, as shown in Table 3:

¹ Consumer Oriented Agricultural Products refer to those high value products which are more-or-less ready to be used at consumers level (e.g. for sale at retail level, for use at restaurants). Examples include mainly those retail customers can find at supermarkets such as beef, sausages, packaged products, fresh fruits and vegetables...etc.

² For 2007, 84% of Hong Kong's exports of COAP to Macau are originated from other countries (source: World Trade Atlas)

Table 3: Hong Kong Re-export of COAP (WORLDWIDE) to Macau (US\$ Million)

HS Code	Description	2003	2004	2005	2006	2007	Growth 07/06	2008 *
	Consumer Oriented Agriculture Total	85.3	112.8	143.1	153.0	217.2	42.0%	300.0
0402	Milk And Cream, Concentrated Or Sweetened	12.3	13.7	17.9	21.5	24.9	16.0%	30.0
2204	Wine Of Fresh Grapes; Grape Must Nesoi	1.9	3.6	4.3	7.3	22.1	203.8%	30.0
1704	Sugar Confection (Incl White Chocolate), No Cocoa	5.2	7.5	10.7	12.2	15.6	27.5%	16.0
2008	Fruit, Nuts Etc Prepared Or Preserved Nesoi	1.7	4.0	6.9	7.5	14.6	95.3%	15.0
1806	Chocolate & Other Food Products Containing Cocoa	5.1	6.5	7.9	11.1	14.3	28.6%	15.0
0203	Meat Of Swine (Pork), Fresh, Chilled Or Frozen	4.0	6.1	5.9	5.2	10.7	104.6%	18.0
1905	Bread, Pastry, Cakes Etc; Comm Wafers, Emp Caps Etc	4.6	5.3	8.6	9.4	10.2	8.6%	11.0
0207	Meat & Ed Offal Of Poultry, Fresh, Chill Or Frozen	7.7	6.3	7.6	6.8	10.0	48.4%	16.0
2202	Waters, Sweetened Etc & Oth Nonalc Beverages Nesoi	5.6	8.1	10.4	7.4	9.0	21.0%	10.0
2103	Sauces & Prep; Mixed Condiments, Mustard Flour Etc	1.7	3.5	4.7	4.0	6.7	67.8%	7.0
1602	Prepared Or Preserv Meat, Meat Offal & Blood Nesoi	1.8	2.5	4.0	4.9	6.5	31.2%	7.0
210690	Food Preparations Nesoi	2.4	3.2	5.4	5.6	6.4	15.3%	8.0
2005	Vegetables Nesoi Prepared Etc Nesoi, Not Frozen	2.5	4.4	4.3	5.1	6.1	18.4%	6.5
1902	Pasta, Prepared Or Not; Couscous, Prepared Or Not	2.0	2.8	3.9	4.0	5.4	33.4%	8.0
0202	Meat Of Bovine Animals, Frozen	2.2	6.2	4.1	2.3	3.9	65.0%	7.0
2203	Beer Made From Malt	5.6	5.3	4.0	3.5	3.4	-2.4%	3.5
0206	Ed Offal, Bovine, Swine, Sheep, Goat, Horse, Etc.	1.3	1.8	2.6	1.7	3.3	88.1%	5.0
1601	Sausages, Similar Prdt Meat Etc Food Prep Of These	2.3	1.8	2.2	2.1	3.2	53.5%	4.5
1901	Malt Ext; Food Prep Of Flour Etc Un 40% Cocoa Etc	1.2	1.1	1.9	2.4	3.0	27.1%	3.2
0406	Cheese And Curd	1.1	1.6	1.7	2.2	2.9	34.7%	4.2
	Total of Top 20 Categories	71.9	95.4	119.0	126.1	182.0	44.3%	224.9
	Total of the Rest	13.4	17.4	24.1	26.8	35.2	31.1%	75.1

(Source: World Trade Atlas) (* Estimated figures for 2008)

Indirect Exports via Hong Kong

Direct exports of US F&B products to Macau are still small in size (US\$9 million in 2007), compared with its re-exports via Hong Kong (US\$23.6 million in 2007)³. The following table shows Hong Kong re-exports of COAP which are of US origin to Macau. This will further give an idea on what US F&B products are popular and in large demand in Macau:

Table 4: Hong Kong Re-export of COAP (of USA Origin) to Macau (US\$ Million)

HS Code	Description	2003	2004	2005	2006	2007	Growth 07/06	2008 *
	Consumer Oriented Agriculture Total	15.7	15.8	17.8	17.6	23.6	34.4%	29.0
	Top 20 Categories (based on 2007 figures)							
2005	Vegetables Nesoi Prepared Etc Nesoi, Not Frozen	1.4	2.4	2.8	3.3	3.2	-4.0%	3.0
1601	Sausages, Similar Prdt Meat Etc Food Prep Of These	2.1	1.6	1.8	1.3	2.4	80.8%	3.3
2008	Fruit, Nuts Etc Prepared Or Preserved Nesoi	0.5	0.7	1.1	1.4	1.7	20.0%	1.7
0207	Meat & Ed Offal Of Poultry, Fresh, Chill Or Frozen	3.6	1.4	2.0	1.3	1.6	18.5%	2.3
2103	Sauces & Prep; Mixed Condiments, Mustard Flour Etc	0.6	1.2	1.4	1.0	1.4	50.8%	1.8
210690	Food Preparations Nesoi	0.9	1.1	1.0	1.0	1.2	27.1%	1.5
0406	Cheese And Curd	0.3	0.5	0.5	0.8	1.0	32.8%	1.4
1704	Sugar Confection (Incl White Chocolate), No Cocoa	0.2	0.2	0.4	0.5	0.9	95.4%	1.0
0802	Nuts Nesoi, Fresh Or Dried	0.2	0.3	0.6	0.9	0.9	1.2%	1.0
1905	Bread, Pastry, Cakes Etc; Comm Wafers, Emp Caps Etc	0.1	0.4	0.5	0.6	0.8	50.2%	1.0
2104	Soups, Broths & Preps; Homogenized Comp Food Preps	0.6	0.6	0.6	0.7	0.7	5.1%	0.8
1602	Prepared Or Preserv Meat, Meat Offal & Blood Nesoi	0.2	0.2	0.3	0.4	0.6	63.8%	0.6
0805	Citrus Fruit, Fresh Or Dried	0.4	0.3	0.3	0.7	0.5	-27.2%	0.5
0407	Birds' Eggs, In The Shell, Fresh, Preserv Or Cookd	0.1	0.1	0.1	0.2	0.5	114.7%	0.5
1806	Chocolate & Other Food Products Containing Cocoa	0.3	0.4	0.4	0.3	0.4	26.0%	0.5
2204	Wine Of Fresh Grapes; Grape Must Nesoi	0.1	0.1	0.1	0.1	0.4	590.8%	0.5
2009	Fruit Juice Nt Frtfd W Vit/Mnl Veg Juice No Spirit	0.2	0.2	0.3	0.3	0.4	29.0%	0.5
2004	Vegetables Nesoi Prepared Or Preserv Nesoi, Frozen	0.1	0.4	0.2	0.3	0.4	32.8%	0.5

³ Source: World Trade Atlas

230910	Dog And Cat Food, Put Up For Retail Sale	0.1	0.2	0.2	0.3	0.3	21.6%	0.4
0806	Grapes, Fresh Or Dried	0.1	0.2	0.4	0.3	0.3	12.0%	0.4
	Total of Top 20 Categories	12.1	12.4	15.0	15.4	19.6	27.4%	23.2
	Total of the Rest	3.6	3.5	2.8	2.2	4.0	83.3%	5.8

(Source: World Trade Atlas) (* Estimated figures for 2008)

CHARACTERISTICS OF THE MACAU F&B MARKET

Land Supply

Macau is a small city, size of which is only 28.2 sq. km (less than one-sixth the size of Washington D.C.). As land supply in Macau is very limited, Macau only has a modest container port with a throughput of 98,668 TEUs in 2007⁴, compared to Hong Kong's 24 million TEUs⁵ for the same period. Therefore, Macau importers normally work with middlemen in Hong Kong and Southern China to handle shipments and storage of their imports of F&B products⁶.

Strong Food Service Sector

Most F&B products are in huge demand because of significant growth in its tourism and gaming industries. As the local population is only around 530,000 and Macau residents' propensity to spend is less than that of its 30+ million tourists. Thus, F&B products catered to the food service sector have a larger potential than the retail sector⁷. The top prospects for growth in the Macau F&B market include: wine, red meats, dairy products, beverages, confectioneries and fruits and vegetables⁸.

LATEST DEVELOPMENT

1. The spectacular economic growth in the past few years has also brought along inflation, which stood at 5.6% in 2007, compared with only 4.4% in 2005⁹. High inflation increases cost of operation in the food service sector and may reduce their demand of better quality but higher-priced US F&B products. High inflation also reduces spending power of tourists and local consumers.
2. The Macau government also realized the challenges posed by the super growth in the gaming/tourism industries. In April 2008, the Macau government decided to stop approving new casino projects and halt issuing new gaming licenses¹⁰.
3. The Chinese government also helped cooling down the super growth in Macau's economy by restricting its residents to visit Macau. As of June 1, Guangdong (the southern Chinese province right adjacent to Macau) started tightening its visa applications from twice a month to once a month. Then on July 1, the province further tightened the rule to once every two months. In addition, from September 1 onwards, Chinese citizens may no longer be permitted to visit Macau through trips to Hong Kong using the same visa¹¹.

⁴ Source: Hong Kong In Figures (2008 Edition)

⁵ Source: Macau Department of Census and Statistics

⁶ Discussions with importers, restaurant owners and hotel operators in Hong Kong & Macau

⁷ Discussions with importers, restaurant owners and hotel operators in Hong Kong & Macau

⁸ Based on F&B exports to Macau and discussions with F&B importers and traders in Hong Kong & Macau

⁹ Source: Macau Department of Census and Statistics

¹⁰ Source: The Standard, July 23, 2008

¹¹ Source: International Gaming and Wagering Business, July 15, 2008

MARKET OUTLOOK & OPPORTUNITIES

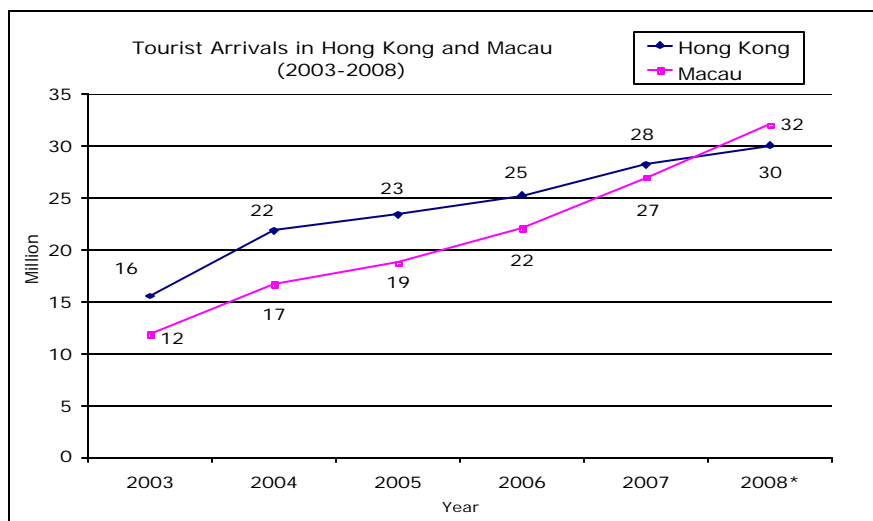
Continued Growth in Tourism

Despite Mainland China's measures to tighten its restrictions on Chinese tourists to Macau, Macau's tourism industry is expected to grow to 32 million visitors by the end of the year:

Table 5: Tourism Statistics in Macau

Tourism Statistics	2003	2007	Growth (07 vs 03)	2008 *
Rooms (Hotels & Guest Houses)	9,185	16,148	76%	18,000
Mainland Chinese Tourists (in Million)	5.74	14.87	159%	17.5
Total Visitor Arrivals (in Million)	11.89	26.99	127%	32

(Source: Macau Department of Census and Statistics) (* Estimated figures for 2008)



Continued Growth in Gaming Industry

As for the gaming industry, Macau earned US\$7.2 billion in casino revenues 2006, overtaking Las Vegas' US\$6.7 billion for the first time. The gap was further widened in 2007 where casino revenues in Macau reached US\$10.5 billion¹², compared with US\$6.8 billion¹³ in Las Vegas. The number of casinos has also grown steadily. The continued increase in the number of casinos and tourism projects will continue to attract tourists to visit Macau, and demand for more high quality foods and beverages in the years to come.

Table 6: Number of Casinos in Macau

Concessionaires	2003	2008
Sociedade de Jogos de Macau (SJM) (Subsidiary of STDM)	11	19
Galaxy Casino, S.A.	0	5
Venetian Macau, S.A.	0	2
Wynn Resorts (Macau) S.A.	0	1
Melco PBL Gaming (Macau) Ltd.	0	2
MGM Grand Paradise, S.A.	0	1
Total	11	30

(Source: Macau Gaming Inspection & Coordination Bureau)

¹² Source: Macau Gaming Inspection & Coordination Bureau

¹³ Source: Nevada Gaming Control Board

Economic Growth Continues

The continued growth of the gaming and tourism industries has a positive impact on Macau's overall economy, as reflected by the statistics¹⁴ below:

Table 7: Economic Growth in Macau

	2003	2004	2005	2006	2007	2008**
GDP (US\$ Billion) *	7.95	10.36	11.58	14.3	19.2	22.1
Growth (current year/last year)	NA	30%	12%	24%	34%	15%
GDP per capita (US\$)	17,697	22,283	23,717	28,436	36,357	42,000
Growth (current year/last year)	NA	26%	6%	20%	28%	16%

(* Calculation based on US\$1 = MOP 8) (** Estimated figures for 2008)

More Hotels in Future

Macau's HRI sector will continue to grow. In 2007, In addition to the 90 hotels¹⁵ that are in operation, more hotels will be completed. Below is a timeline of some selected hotels/resorts that are due to open in the later half of 2008 through 2010¹⁶:

2008	Four Seasons Hotel
	Four Seasons Private Residences
2009	Shangri-La Hotel
	Traders Hotel
	Sheraton Hotel
	St Regis Hotel
	St Regis Macao Cotai Strip Residences
2010	Hilton Macao
	Conrad Macao
	Conrad Private Residences
	Holiday Inn Macao
	InterContinental Macao
	Residences at the InterContinental Macao
	Fairmont Macao
	Swissotel Macao
	Raffles Macao
	Raffles Macao Residences

The growing number of hotels will be able to accommodate the larger demand of foods and beverage from the 30+ million tourists visiting Macau and also the growing number of staff serving at hotels and casinos, which employed close to 40% of Macau's total employed population¹⁷.

Price Competitiveness of US Products Continues

Like Hong Kong, Macau currency (MOP) is pegged with the US dollar (US\$1=MOP8). This makes cost and profit of exporting to Macau very easy to calculate and predict. In addition, with the weak US dollar, US F&B products are more price-competitive and price-attractive.

¹⁴ Source: Macau Government Department of Census and Statistics

¹⁵ Estimated figure based on data from the Macau Government Department of Census and Statistics

¹⁶ Source: Cotai Casino News

¹⁷ Source: Macau Government Department of Census and Statistics

Favorable Policies Underway

To reduce inflation and enhance the trade competitiveness of Macau, the Macau government is deliberating a new policy to abolish the tax on wine, beer and gasoline¹⁸. The abolishment of the tax on wine and beer will help Macau maintain its competitiveness in the trade and attract more direct exports of wine and beer to Macau.

More Direct Imports

As the demand for food products grows, Macau importers that used to buy products from Hong Kong distributors are now considering buying directly from suppliers. One major food importer has already built a larger warehouse to cater for the increase in demand for food and beverage products from both the retail and HRI sector. In addition to strengthening its cooperation with ports in Hong Kong and Southern China, Macau is planning to develop its second container port to handle the increase in trade volume¹⁹. Furthermore, the large resort/casino operations report that they too are investigating opportunities to expand warehouse/storage facilities at the port, as well as build new facilities to meet the anticipated growth in the F&B sector.

Diversification by the Macau Government

The Macau government has realized its heavy reliance on the tourism and gaming industries. As a result, it is now moving to promote Macau as a regional center for Meetings, Incentives, Conventions and Exhibitions (M.I.C.E.). The diversification strategy will increase the breadth for Macau's long-term economic growth²⁰ as Macau can offer more competitive rates in most cases, than its neighbors.

Macau – Gateway to China

Macau is a gateway to China, particularly to the western part of its adjacent Guangdong province. Given the close economic ties between Macau and China, US exporters who find it difficult to sell to China directly may first sell to middlemen in Macau who have more experience in exporting to China. In addition, like Hong Kong, Macau has signed the Closer Economic Partnership Arrangement (CEPA) with China. CEPA provides liberalization measures on the trade of goods and services entering the mainland and promising benefits for Macau's economy.

Long Term Developments in Macau

The construction work for the bridge linking up Hong Kong & Macau with their neighboring cities of Zhuhai and Shenzhen in southern China is set to commence in 2009 and expected to be completed in 2013²¹. The US\$4 billion project is expected to boost the ties in trade and tourism between Macau, Hong Kong and their neighboring cities of Zhuhai, Shenzhen and the rest of Guangdong province. This will be another factor supporting the continued and long-term growth of Macau.

¹⁸ Source: Headline News, August 8, 2008

¹⁹ Source: Macau Port S.A.

²⁰ Source: Macau Trade and Investment Promotion Institute (IPIM)

²¹ Source: The Standard, August 3, 2008

HOW TO GAUGE THE OPPORTUNITIES

For new-to-market companies that wish to enter the Macau market, the following approaches are recommended:

- Exhibiting in a trade show: There is a trade show in Macau for U.S. food and beverage exporters to showcase their high quality products to buyers from Macau, Hong Kong, China and the region:

Wine and Gourmet Asia (Nov 5-7, 2008): <http://www.wineandgourmetasia.com>

- One-on-one meetings with potential importers: Most importers in Macau are interested in meeting new-to-market exporters in a private environment. A list of food importers in Macau is available from the Agricultural Trade Office.

USEFUL CONTACTS

Post Contact

Foreign Agricultural Service (FAS)

Home Page: <http://www.fas.usda.gov>

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The American Chamber of Commerce in Macau

Alameda Dr. Carlos d'Assumpção No 263,

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Tel: (853) 2872 8212

Fax: (853) 2872 7123

Email: alan.chan@amcham.org.mo

Website: <http://www.amcham.org.mo/>

Macau Government Tourist Office

Address: Alameda Dr. Carlos d'Assumpcao, nºs 335-341

Edifício "Hot Line", 12º andar, Macau

Tel: (853) 28315566

Fax: (853) 28510104

Tourist Hotline: (853) 28333000

Email: mgto@macautourism.gov.mo

Website: <http://www.macautourism.gov.mo>

Macau Hotel Association

Address: Rua Luis Gonzaga Gomes S/N, BL IV,
R/C Centro Actividades Turisticas, Room B, Macau
Tel: (853) 28703416
Fax: (853) 28703415
Email: mhacmo@macau.ctm.net
Website: <http://www.macauhotel.org>

Association of Macau Tourist Agents

Address: Rua de Nagasaki, Edif. Xin Hua, 10 andar, NAPE, Macau
Tel: (853) 28388166
Fax: (853) 28330890
Email: amta@macau.ctm.net

Association of Retailers & Tourism Services

Address: Avenia da Amizade, 555, Macau Landmark, Suite 708, Macau
Tel: (853) 28786223
Fax: (853) 7975335

Macau Hotel Trade Commercial Association

Address: Travessa da Praia Grande 10, Nga Yuen Building, 1st Floor - B, Macau
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Fax: (853) 28376365
Email: mhia@macau.ctm.net

Macau Travel Agency Association

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2nd Floor B-D, Macau
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Fax: (853) 28702034 / 28701083
Email: myt@macau.ctm.net

Travel Industry Council of Macau

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Fax: (853) 28787933
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Website: <http://www.ada.com.mo/>

Association of Macau Restaurant Merchants

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Fax: (853) 28511585
Email: amrm@macau.ctm.net

Macao Chamber of Commerce

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Tel: (853) 576833
Fax: (853) 594513
Email: acmmco@macau.ctm.net
Website: <http://www.acm.org.mo/>